

# Scheduling Reports

You can schedule the reports that you use frequently to run in the background so they will be ready for you when you need them. By scheduling a report, you do not have to set it up each time you want to run it and wait for it to complete. Possible examples are:







- A daily report of the vouchers your agency received for the previous business day
- A weekly report of Fedwires greater than \$10,000
- A monthly report of returned transactions for a particular ALC or RTN
- A weekly report of user activity for the users in your Access Group (for Security Users)

You can schedule any standard report or any report copy that you have saved and modified in the My Favorites folder. You can specify the report filters you want to use as if you were running the report on demand. You can choose a report format of Web Intelligence (resembles a report run on demand); Adobe PDF (useful if you want to print the report); Microsoft Excel; CSV (a file containing unformatted data); or Plain Text.

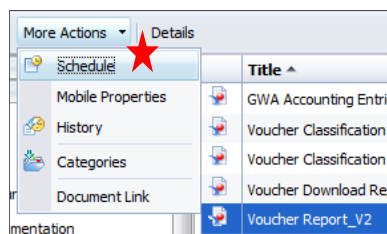
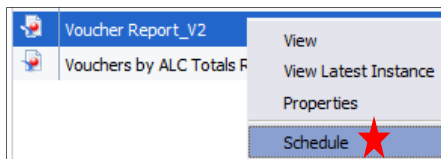
Reports that you schedule to be delivered to your CIR Inbox are stored there for 15 days.

You can choose to receive a notification through email that your scheduled report is ready.

1. Highlight the name of the standard report or report copy that you want to schedule.

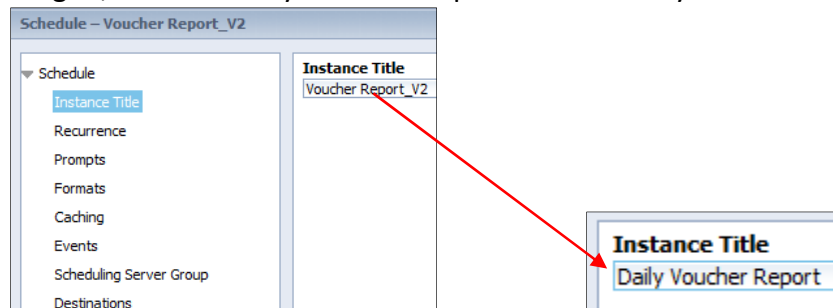
Title ^	
	GWA Accounting Entries Report
	Voucher Classification Report by Business Date
	Voucher Classification Report by Voucher Date
	Voucher Download Report_V2
	<b>Voucher Report_V2</b> ★
	Vouchers by ALC Totals Report

2. Right-click the mouse to see the menu, **OR** click the **More Actions** button in the menu bar to see the menu.
3. Click **Schedule**.

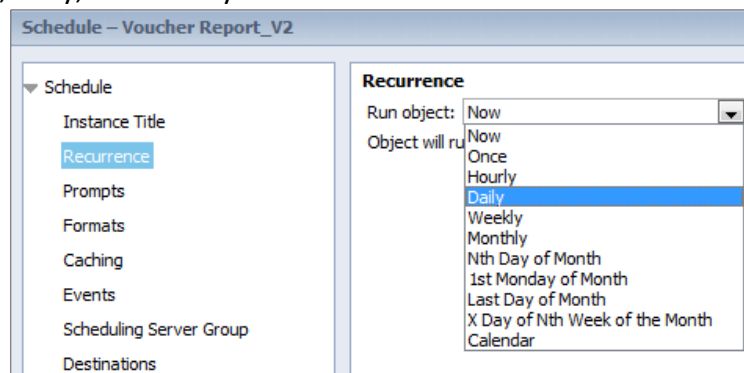


You see a new window to lead you through the Schedule options. The steps are listed in the left navigation panel and the details about each step are in the main body of the window.

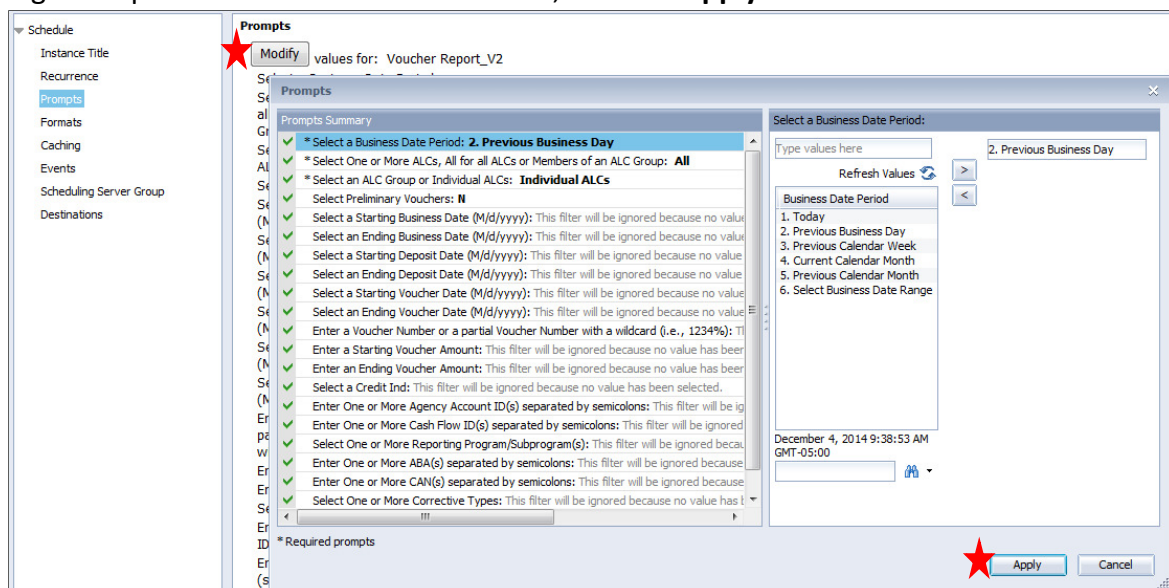
- The first option is to change the title of your report. You can change the title of your scheduled report to be more meaningful, such as “Daily Voucher Report” or “Monthly Returns.”



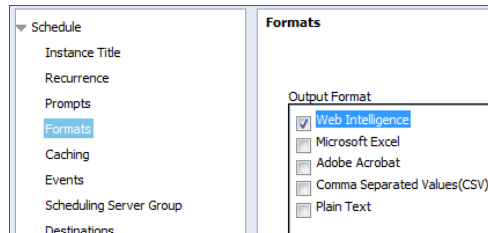
- In the left panel, click **Recurrence** in order to specify how often you want the report to run – for example, immediately, daily, or monthly.



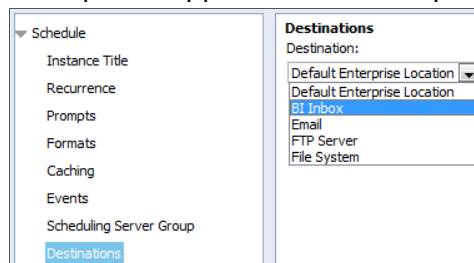
- In the left panel, click **Prompts** to specify the prompts you want to use.  
If you want to use the default prompt values for this report, you can skip this step.  
If you want to change the prompts, click the **Modify** button and change the prompts as if you were running the report on demand. When finished, click the **Apply** button.



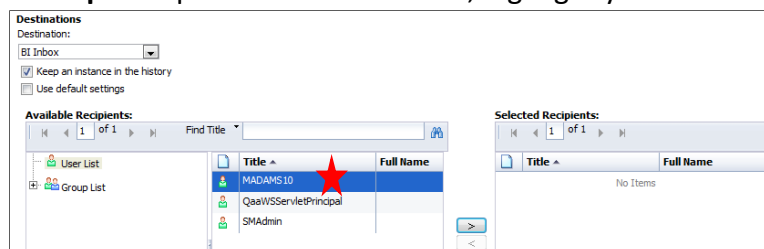
7. In the left panel, click **Formats**. Specify the format you want for your report. If you're going to print the report, try using Adobe Acrobat. If you're going to load the report data to your agency's internal financial system, try CSV format.



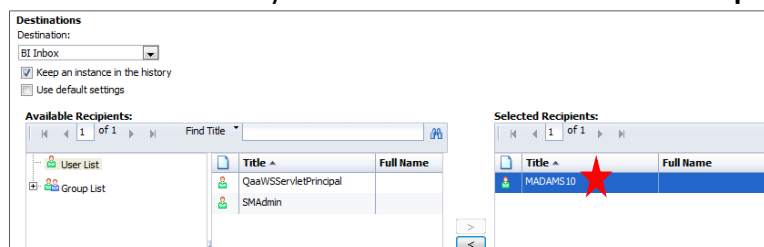
8. Ignore the next three choices in the left navigation panel. They do not apply to CIR.
9. In the left panel, click **Destinations**. You can choose only one of two options, **BI Inbox** or **Email**. The other options are not valid for CIR. Examples are shown below.
  - a. In the drop-down box, click **BI Inbox** to have the report delivered to your CIR Inbox. When you choose this option, additional options appear in the lower portion of the window.



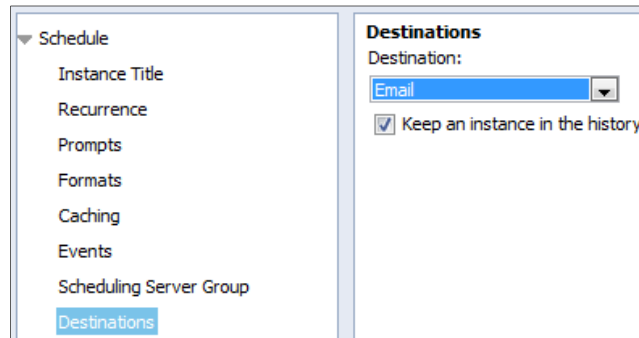
- b. In the **Available Recipients** portion of the window, highlight your username in the pane on the left.



- c. Click the right arrowhead to move your username to the **Selected Recipients** pane on the right.

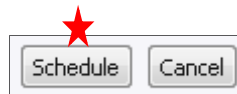


- d. Alternatively, in the drop-down box, click **Email** to have a notification that your report is ready sent to the email address in your CIR user profile.

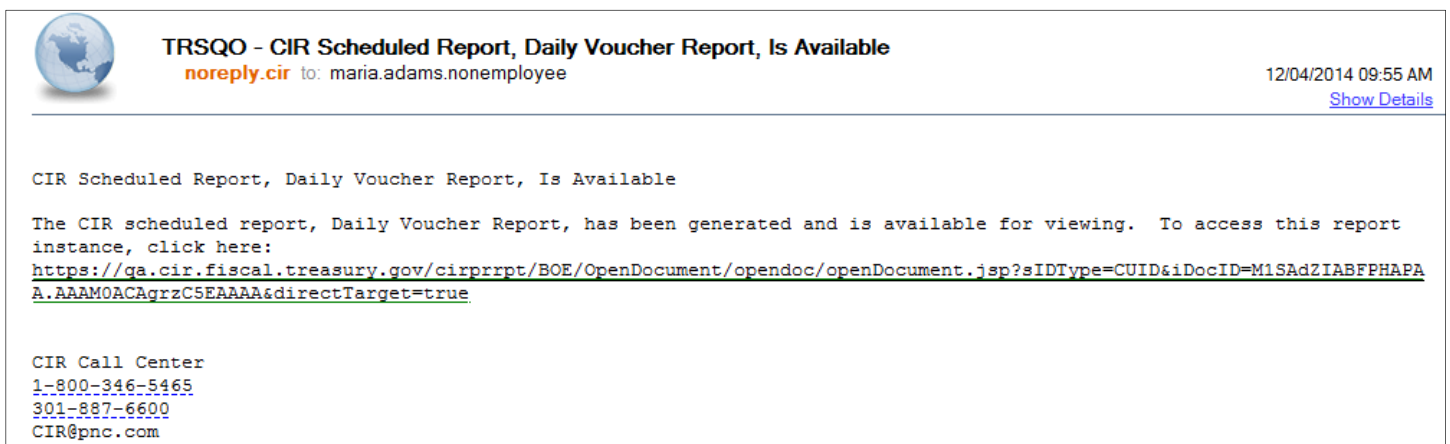


10. Do not modify any other options in this window. They do not apply to CIR.

11. Click the **Schedule** button in the lower right-hand corner of the window.



If you have scheduled your report to have a notification sent to the email address stored in your CIR user profile, you will receive an email message that looks like this:



12. Click the link in the email. Log in to CIR and your report will open.